

erwin Data Modeler

DM Connect for DI

Release 14.0

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## **DM Connect for DI Overview**

erwin now offers an integration, DM Connect for DI, between two powerful products, erwin Data Modeler erwin DM) and erwin Data Intelligence (erwin DI). This offering enables you to maintain a single metadata and glossary source across erwin DM and erwin DI using erwin Mart Portal as an interface. Apart from this, DM Connect for DI offers the following benefits:

- Use data models as a foundation for data governance initiatives
- Automatically update data catalog
- Maintain a business glossary based on naming standards

## Workflow

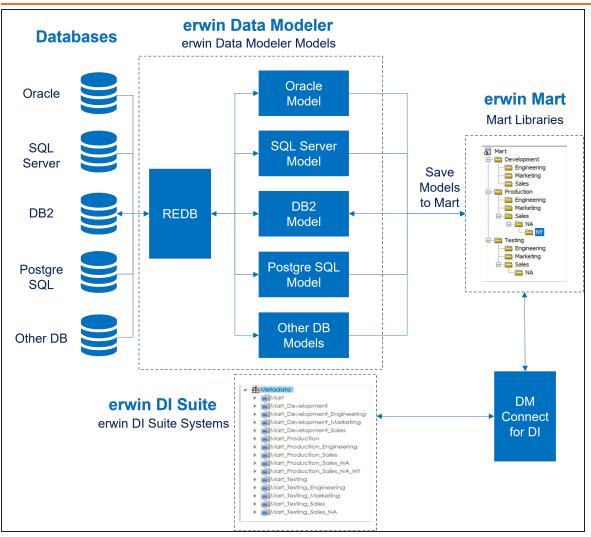
erwin DM supports several target databases. It provides a powerful and robust workspace to create rich data models based on these target databases. Further, it provides connectivity to erwin Mart Portal; where you can store your rich data models in a mart repository.

erwin Mart Portal acts an interface between erwin DM and erwin DI. It enables you to schedule jobs to export data models and data sources from your mart repository to erwin DI Data Catalog and vice versa. Further, it integrates the naming standards set up on your models into the Business Glossary Manager.

erwin DI enables you to use your data models as a foundation for your data governance initiatives. It enables you to maintain a semantic lineage between metadata and business objects.

To summarize, erwin Data Modeler, erwin Mart Portal, and erwin DI work together as follows.

#### **DM Connect for DI Overview**



The following table explains the erwin DM, erwin Mart Portal, erwin DI version compatibility:

Products-Versions	erwin DI 12.1	erwin DI 13.0	erwin DI 14.0
erwin Mart Portal 2021R1	No	No	No
erwin Mart Portal 12.0	No	No	No

#### DM Connect for DI Overview

Products-Versions	erwin DI	erwin DI	erwin DI
FIGURES-VEISIONS	12.1	13.0	14.0
erwin Mart Portal 12.1	Yes	Yes	No
erwin Mart Portal 12.5	No	Yes	Yes
erwin Mart Portal 12.5.1	No	Yes	No
erwin Mart Portal 12.5.2	No	Yes	Yes
erwin Mart Portal 14.0	No	No	Yes

Before configuring erwin DM Connect for , ensure that the prerequisites for erwin Mart Portal and erwin Data Intelligent (erwin DI) are in place:

- System requirements:
  - erwin Mart Portal
  - erwin DI
- Permissions:
  - erwin Mart Portal
  - erwin DI
  - erwin DI DocumentsPath

## erwin Mart Portal System Requirements

Refer to the	following	tables for	minimum	system	requirements:
			-		

Parameter	Requirement	Additional Inform- ation
Hard- ware/Work- station	<ul> <li>VM or Dedicated Physical Server</li> <li>Windows-based workstation</li> <li>100 GB of disk space or more as required to support your specific mart</li> <li>Processor - 64-bit, minimum 4 cores</li> <li>RAM:         <ul> <li>Only erwin Mart Portal: 16 GB</li> <li>Both erwin Mart Portal and erwin ER360: 32 GB</li> </ul> </li> </ul>	
Operating Sys- tem	<ul> <li>Microsoft Windows Server 2016</li> <li>Microsoft Windows Server 2019</li> <li>Microsoft Windows Server 2022</li> <li>All current Microsoft Windows critical updates</li> </ul>	

Parameter	Requirement	Additional Inform- ation
Database	<ul> <li>Microsoft SQL Server 2017, 2019, and 2022. You can also use Microsoft SQL Azure and Amazon RDS SQL Server.</li> <li>Oracle 18c, 19c, 21c, and Oracle Cloud</li> <li>PostgreSQL 12.x, 13.x, 14.x, 15.x, and 16.x. You can also use PostgreSQL for Amazon RDS.</li> <li>For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2</li> </ul>	<ul> <li>SQL Server:</li> <li>The Mart Portal can use a standalone or can share an existing database server for a Microsoft SQL Server.</li> <li>The SQL Server 2017 and 2019 TRUSTWORTHY database property is no longer required for the mart. After you install this product, you can optionally reset this property to OFF.</li> <li>The database user account that is used to configure the Mart must have the dba_owner role assigned.</li> <li>(Optional) To use the Korean language, use</li> </ul>

Parameter	Requirement	Additional Inform- ation
		the Korean_wan- sung_CI_AS char- acter set. Select the character set while cre- ating the Mart database (in the Collation field). For more information, see the SQL Server documentation.
		Oracle:
		<ul> <li>The Mart Portal can use a standalone or can share an existing database server for an Oracle database. You can also use a pluggable database.</li> <li>To create the Mart, you must be the database schema owner user and you must have the DBA role in the</li> </ul>

Parameter	Requirement	Additional Inform- ation
		<ul> <li>target database on the Oracle server. The DBA role is required for the user who is specified in the Configure Mart Portal dia- log. If the DBA privilege of this user is revoked, then erwin DM users will not be able to save model changes to the Mart.</li> <li>(Optional) You have modified the following parameters in the initialization file (InitSID.ora): Remote_OS_ Authent=T OS_Authent_ Prefix=TRUE</li> <li>(Optional) To use the Korean language with the Mart data- base, use</li> </ul>

Parameter	Requirement	Additional Inform- ation
		<ul> <li>KO16MSWIN949 or AL32UTF8 character set depending on your operating system lan- guage pack. For more inform- ation, see the Oracle doc- umentation.</li> <li>If the Mart data- base is an Oracle data- base, the default tablespaces that were used for initializing any earlier release of r9 series Mart are available for the latest release.</li> </ul>
		PostgreSQL:
		<ul> <li>The Mart Portal can use a stan- dalone or can share an exist- ing database server for Post-</li> </ul>

Parameter	Requirement	Additional Inform- ation
		greSQL. The database user account that is used to configure the Mart must have super user per- missions.
erwin Mart Portal Web Cli- ent - Browser	Latest versions of the following browsers: • Microsoft Edge • Mozilla Firefox • Google Chrome • Apple Safari	
Web Client Workstation	<ul> <li>Processor - i3 or higher</li> <li>RAM - 8 GB minimum</li> <li>Minimum Free Space - 1-2 GB</li> </ul>	
Web Server	Apache Server 2.4.62	
JDK	17.0.12	
MartPortal Ser- vices	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: reg add "HKLM\SYSTEM\Cur- rentCon- trolSet\Services\erwinMartPortal\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" - Xms2048m -Xmx10240m -Dlog- ging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-portal.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartAp- p\MartPortal.jar\"" That is, (2GB -10GB)	

Parameter	Requirement	Additional Inform- ation
ER360 Services	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs as follows: reg add "HKLM\SYSTEM\Cur- rentControlSet\Services\erwinER360\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" - Xms2048m -Xmx10240m -Dlog- ging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\\og4j2-er360.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartAp- p\ER360.jar\"" That is (2GB - 10GB)	
Vault Services	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: reg add "HKLM\SYSTEM\Cur- rentCon- trolSet\Services\erwinVaultService\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" - Xms2048m -Xmx4096m -Dlog- ging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\\og4j2-vaultservice.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartAp- p\vaultservice.jar\"" That is, (2GB -4GB)	

Ensure that you always install erwin Mart Portal on Windows operating system.

## erwin DI System Requirements

Parameter	Requirement
Hardware/Workstation	<ul> <li>VM or Dedicated Physical Server</li> <li>Processor - 64-bit, minimum 4 cores</li> <li>RAM:</li> </ul>

Parameter	Requirement		
	<ul> <li>16 GB for limited user POCs</li> <li>32-64 GB for enterprise production deployment</li> <li>Hard Disk Drive - 200-300 GB</li> </ul>		
Operating System	<ul> <li>Microsoft Windows - Windows Server 2016 and above</li> <li>Linux v4.19 and above</li> <li>RHEL 8.0 and 8.5</li> <li>Amazon Linux 2</li> </ul>		
Database	<ul> <li>SQL Server 2016, 2017, 2019</li> <li>For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2</li> <li>Oracle 12c, 18c, 19c</li> </ul>		
Browser	<ul> <li>Microsoft Edge v86x or newer</li> <li>Google Chrome v86.0 or higher</li> <li>Mozilla Firefox v82.0 or higher</li> </ul>		
Web Servers	Apache Tomcat v9.0.58		
Web Server Memory Allocation	Allot at least 50 percent of available memory. For example, if available memory is 16GB, allot at least 8GB.		
Web Client Workstation	<ul> <li>Processor - i3 or higher</li> <li>RAM - 8GB minimum</li> <li>Minimum Free Space - 1-2GB</li> </ul>		

In case of enterprise deployment, for the best performance, it is recommended to allot at least 0.5 GB space per user on the application server. For example, if 30 users log on simultaneously, the application server must have at least 15 GB of RAM allocated to it.

The above RAM allocation does not indicate the RAM of the server machine. It indicates the physical RAM allocation to the application server.

## **Database Server Specifications**

The following table lists database server specifications:

Parameter	Requirement
Server Type	Dedicated standalone server
Processor	64-bit, minimum 4-8 cores
RAM	32 GB
Hard Disk Drive	250-500 GB
Tablespace	50 GB, minimum

erwin DI requires a dedicated schema/database (SQL Server or Oracle) with at least 50 GB tablespace allocated to it, which increases exponentially based on usage.

## Permissions

To use DM Connect for DI, you need certain permissions on erwin Mart Portal and erwin Data Intelligence (DI).

## **Minimum erwin Mart Permissions**

You can use DM Connect for DI only if your account has been assigned the following profiles:

- Administrator
- Architect

## **Minimum erwin DI Permissions**

#### Metadata Manager

Create System

#### Metadata Manager

Systems/System Tabs/View System Details

List Systems

Systems/Add Environment

Systems/List Environments

Systems/System Environments/Import Environment

Systems/System Environments/New Version

Systems/System Tabs/View Environment Details

Systems/Configure Expanded Logical Name

Systems/System Environments/Environment Tabs/Extended Properties/Edit Extended Properties

Systems/System Environments/Scan Metadata

Systems/System Environments/Environment Tabs/EnvironmentDetails

#### **Mapping Manager**

Projects/Create Project

Projects/Mappings/Create Mapping

Projects/Project Tabs/Project Details/View Project Details

Projects/Mappings/Mapping Grid/Edit Mapping Specification Grid (Any one permission in child permissions)

#### Business Glossary Manager

Custom Objects/Catalog/Create

Custom Objects/Catalog/Edit

#### **Business Glossary Manager**

Custom Objects/Catalog/View

Custom Objects/Catalog/Custom Objects/Create

Custom Objects/Catalog/Custom Objects/Edit

Custom Objects/Catalog/Custom Objects/View

Custom Objects/Import Catalog

## erwin DI DocumentsPath

To be able to export data from erwin Data Modeler (DM) to erwin DI, ensure that you update the **iccdocuments.properties** file in erwin DI as follows:

- Windows: If you change the default installation location, follow these steps:
  - 1. Open the **iccdocuments.properties** file from the following location: *Apache Software Foundation\Tomcat 8.5\webapps\<Application Name>\WEB-INF\configuration\properties\iccdocuments.properties*
  - 2. Change the **DocumentsPath** value to the current installation location: <*drivename>:/<application name>*

For example, consider you changed the installation location from the default location to:

D:\Apache Software Foundation\Tomcat 8.5\webapps\erwinDISuite\WEB-INF\- configuration\properties.

Then, change the **DocumentsPath** to: D:/erwinDISuite

- **Linux**: Ensure that you follow these steps:
  - Open the iccdocuments.properties file from the following location: /opt/tomcat/webapps/<<erwinDISuite>>/WEB-INF/configuration/properties/iccdocuments.properties
  - Change the **DocumentsPath** value to: opt/tomcat/<application name>

For example, change the **DocumentsPath** from *C:/MappingManager* to:

opt/tomcat/erwinDISuite

## Configuration

To import and export data models, data sources, and naming standards using DM Connect for DI, you need to configure your erwin Data Intelligence (erwin DI) application in erwin Mart Portal.

To configure erwin DI, follow these steps:

 Go to Application Menu > Settings > DI Configurations. The DI Configurations page appears.

s	Settings						€	Add Co	ofigura
6	👌 General	🔞 View Logs	② DI Configurations	🔓 Change Logo	🗍 Delet	te Mart Portal			
	Q Search	n for Name, Server Nar	ne					000	G
	Name	Sever Name	Application Name	Port Number	SSL	Username	Timeo	ut	
			No results f	ound for DI Configurat	tions				

2. Click Add Configuration.

The Add New Configuration section appears.

Configuration

🗑 General	O View Logs	🖄 DI Configurations	🔓 Change Logo
Add New Confi	i curatian		
Configuration N Enter Configur	ame *		
- Server Name * - Enter Server N			
<ul> <li>Application Nan</li> <li>Enter Applicat</li> </ul>			
- Port *		False	~
Username *		Password *	8

3. Configure your erwin DI connection parameters as follows:

Field	Description
Configuration Name	Specify a unique name for the configuration
Server Name	Specify the server address, where erwin DI is installed
Application Name	Specify the name of your erwin DI Application
Port	Specify the port on your server that is used for erwin DI

#### Configuration

Field	Description
Enable SSL	Specify whether you want to connect to the server through a secured connection
Username	Specify your erwin DI user name
Password	Specify your erwin DI password
Session Timeout	Specify erwin DI's session time out duration in minutes

#### 4. Click **Test**.

#### 5. Click Save.

Your connection is tested and saved. You can set up multiple erwin DI configurations and use them as required.

An Export to DI job converts a model to erwin DI compatible format and then,

- exports the model to the Metadata Manager
- exports the source and target column data from a dimensional model into the Mapping Manager

Once source and target column data is exported, any updates made to them are not exported when the job runs again.

 If the model has an associated NSM file, it exports the file to the Business Glossary Manager

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence(erwin DI), refer to the <u>Data Sharing</u> topic.

By default the DM Connect for DI app opens in the Calendar view. You can toggle the page view between the List View (()) or Calendar View ()) using the respective buttons on the page toolbar.

To schedule jobs, follow these steps:

1. In the header pane, click **III** and then click **DM Connect for DI**. The DM Connect for DI page opens.

DM Connect fo	or DI				- <u>-</u>	mport Job
🖾 Month 🗸	<	27 August 2024	>		⊗	G
Sun	Mon	Tue	Wed	Thu	Fri	
28	29	30	31	1		2
4	5	6	7	8		9
11	12	13	14	15		16

- 2. Click a suitable calendar slot or click **Export Job**.
- 3. Click **Export to DI**.

The Add Export Job page appears.

Add Export Job			🗲 Back 🕞 Sav
Catalogs	- C 6	DI Information	Job Information
Q Loaded Catalogs	~ D Include NSM	Connectors	▼ Job Name Enter Job Name
✓		Systems Name	▼ Start Date/Time 08/27/2024 05:52 PM
> D New Library		Environment Name EX: %SYSTEM_%MODEL_%PATH	Job Interval
Publication	SystemSample	Add New Version False	Frequency     OB/28/202
			Notify Me Notification Email Email CC List Email
			Run Now

4. Set up job parameters as follows:

Tab	Field	Description
Catalogs	Catalog Tree	Select models from mart catalog to export. Before you select models, you can use the All Catalogs or Loaded Catalogs to display all available catalogs or only the expanded cata- logs respectively. Apart from that, after you select catalogs, you can click to view only the selected catalogs in the Catalogs section.
	Include NSM	Select whether naming standards must be exported.

Tab	Field	Description
		A catalog named by the NSM file is created under <b>Business Glossary Manager</b> > <b>DM</b> <b>NSM Files</b> custom asset.
		Ensure that the DM NSM Files asset is enabled in <b>erwin DI &gt; Business Glossary</b> <b>Manager Settings</b> .
	Connectors	Select a configuration to use for the export job.
	Systems Name	Enter a system name. This corresponds to Sys- tem in Metadata Manager.
DI Inform- ation	Environment Name	Use the predefined macros to set the envir- onment name. This corresponds to Envir- onment in Metadata manager.
		<ul> <li>For system and environment names, following special characters are allowed:</li> <li>System: - (hyphen), _ (underscore), and space</li> <li>Environment: @ (at sign), \$ (dollar sign), &amp; (ampersand), / (slash mark), - (hyphen), _ (underscore), and space All other special characters are replaced with _ (underscore).</li> </ul>
		Select a suitable export option:
	Export Option	<ul> <li>Add New:</li> <li>If an environment exists, this option adds any new tables or columns to it.</li> <li>If an environment does not exist,</li> </ul>
		this option creates an envir- onment and adds tables and

Tab	Field	Description
		columns to it.
		• Update Existing + Add New:
		• If the existing model objects have changed, this option exports the updates to the existing model objects in erwin DI .
		• Also, it exports any new objects in the model to erwin DI .
		<ul> <li>Update Existing + Add New + Inval- idate:</li> </ul>
		Along with the functionality of Update Existing + Add New option, this option invalidates any deleted tables or columns.
		• <b>Delete &amp; Reload</b> : This option deletes all the tables and columns. Then, it exports them again.
	Version	Select whether a version of an existing envir- onment must be created. This archives the existing environment.

Tab	Field	Description
	Job Name	Specify a job name.
	Start Date/Time	Select the date and time at which the job must start.
	Job Interval	Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly. You can also set up custom recurrence for jobs.
	_	Select the hourly frequency at which the job should run.
	Frequency	This property is available only when you set the Job Interval to Recurring.
	End Date/Time	If you set up recurring jobs, select the date and time at which the recurrence must end.
Job Inform- ation	Days	Select the days of the week on which the job should run. The days available here depend on the End Date/Time.
		This property is available only when you set the Job Interval to Recurring.
	Notify Me	Select whether a notification is sent to you when the job status changes. This enables the Notification Email and CC List fields.
	Notification Email	Specify the email address at which you want to receive the notification.
	CC List	Specify a semi-colon-separated list of email addresses that must receive the job notification.
	Run Now	Select the check box to run the job imme- diately.

5. Click Save.

The job is added to the calendar for execution with its **Job State** set to Scheduled.

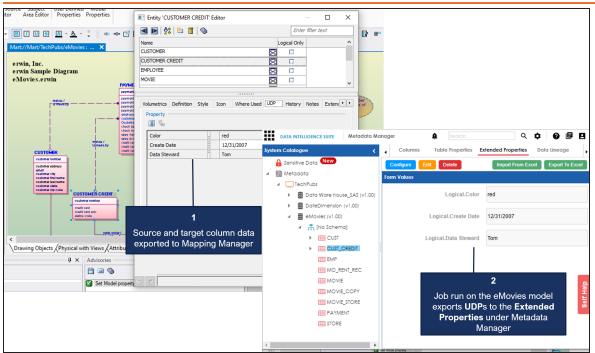
The job runs according to the schedule and exports data model to Metadata Manager and naming standards to Business Glossary Manager.

erwiñ	erwin	Mart Administrator		
» 📕 DM Connect for DI				
🕞 Add Job 🛛 🍙 Delete Job 🛛 🔓	Manage Job   👩 Cancel Job   👩 Re	fresh Job   💿 View Log   💼 Rur	dof u	1
Job Name Last Schedu				Job run on TechPubsModel,
TechPubsEMovies 2020-06-08	19:43:39 Co	ompleted Success	2020-06-08 19:42:59	lechPubs NSM file attached
DATA INTELLIGENCE SUITE Metadata	Manager		Le Search	to the model
System Catalogue <	Metadata Summary			
🔒 Sensitive Data 🔍	Data Dictionary Configure External	ended Properlies Scheduled Jobs		
Metadata	# System	Business Purpose	# of Environments	
Technical_Publications     TechnicalPublications		DATA INTELLIGENCE SUITE Business Glossary Ma	nager	A Ø 1
⊿	1 Technical_Publications	CATALOG VIEW Workspace C DM	NSM FILE Summary	
TechPubsModel (v1.00)	2 TechnicalPublications 3 TechPubsEMovies	A DM NSM Files		Add DM NSM File
✓ 💏 [No Schema]	5 TechrubsEwiovies	MyMovieList (6)	Compact View Grid View	
E_2		TechPubs (6)	Search	Items Per Page 50  Page 1 PREVIOUS NEXT
			TechPubs	
2		3	C CUST No Description available	No Status 0
Model exported to Metada	ta TechPubs	NSM file exported		
Manager		s Glossary Manager	TechPubs	
			E	No Status 0
			No Description available	

Database connection parameters such as DBMS Name/DSN, IP Address/Host Name, Port, and Business Entity Type (System Environment Type) are stored in environment details.

4	Data Dictionary	Environment Details	Extended Properties	Data Lineage	Impact as Source	Impact as Target	Mindmap
	Workflow Status						>>
	System Environment Name*	Dem	o_SQS2019_REDB_DISV11	Driver Name*	1	the second second	
	System Environment Type	erwi	n DM Mart - SqlServer	DBMS Name/	/DSN*	disv11	
	Data Steward			IP Address/He	ost Name*	localhost	
	Server Platform			Port**			
	Server OS Version			User Name*		-	
	File Management Type			Password*		1////	111
	File Location			Url*		1////	111

Also, the UDPs and validation rules in the model are exported to the Extended Properties tab in Metadata Manager.



## Case I: Run Job

The Run Job option immediately runs a job. This option works only if the selected job is a recurring job in the scheduled state.

## Case II: Modify Job

The Manage Job option lets you modify an existing scheduled job. If you modify a job:

- before its run schedule, the changes take effect when the job runs
- while it is running, the job is cancelled, and changes are saved. They take effect when the job runs next time.
- after it is past its schedule, the job runs according to the new schedule

## **Case III: Recurring Job-No Change in Models**

Recurring jobs run based on the Job Interval you set while scheduling them. If the models selected in the job have not changed between job intervals, the job still runs according to the schedule. However, no data is exported to erwin DI.

## Case IV: New Model in the Folder

If a new model is added to an existing folder on which a recurring job has been scheduled, DM Connect for DI auto-syncs it to the job. The new model in included in the job automatically, when the job runs next.

## Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

An Import to DM job imports environments and the underlying tables, columns, and metadata to a mart catalog in the original file format as a model. You can then, connect to your mart via erwin DMand open the saved model. erwin DMautomatically converts this model to an erwin model. You can save this model locally or on mart. When you save this model back to the mart, it is saved with the corresponding timestamp.

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence (erwin DI), refer to the <u>Data Sharing</u> topic.

By default the DM Connect for DI app opens in the Calendar view. You can toggle the page

view between the List View ()) or Calendar View () using the respective buttons on the page toolbar.

To schedule import to DM jobs, follow these steps:

- 1. In the header pane, click **iii** and then click **DM Connect for DI**. The DM Connect for DI page opens.
- 2. Click a suitable calendar slot or click **Import Job**.
- 3. Click **Import to DM**.

The Add Import Job page appears.

Add Import Job		e Bac	k 🗎
DI Information	Library	Job Information	
Connectors Systems Name  Environment Name	✓ ■ Mart □ New Library		te/Time
		Run Now	

#### Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

4. Set up job parameters as follows:

Tab	Field	Description
DI Inform- ation	Connectors	Select a configuration to use for the import job.
	Systems Name	Select a system from the list of available sys- tems based on your DI configuration

#### Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

Tab	Field	Description
	Environment Name	Select one or more environments from the list of available environments based on the selec- ted system.
Library	Select Models	Select the mart catalog/library to import models to.

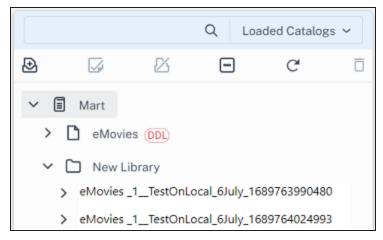
#### Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

Tab	Field	Description	
	Job Name	Specify a job name.	
	Start Date/Time	Select the date and time at which the job must run.	
	Job Interval	Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly. You can also set up custom recurrence for jobs.	
	Fraguency	Select the hourly frequency at which the job should run.	
	Frequency	This property is available only when you set the Job Interval to Recurring.	
	End Date/Time	If you set up recurring jobs, select the date and time at which the recurrence must end.	
Job Inform- ation	Days	Select the days of the week on which the job should run. The days available here depend on the End Date/Time.	
		This property is available only when you set the Job Interval to Recurring.	
	Notify Me	Select whether a notification is sent to you when the job status changes. This enables the Notification Email and CC List fields.	
	Notification Email	Specify the email address at which you want to receive the notification.	
	CC List	Specify a semi-colon-separated list of email addresses that must receive the job notification.	
	Run Now	Select the check box to run the job imme- diately.	

### Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

- 5. Click Save.
  - The job is added to the calendar for execution with its **Job State** set to Scheduled.

On successful job completion, the imported model is added to the selected library in the original erwin DI format. To use this model, you must convert it to erwin DM format.



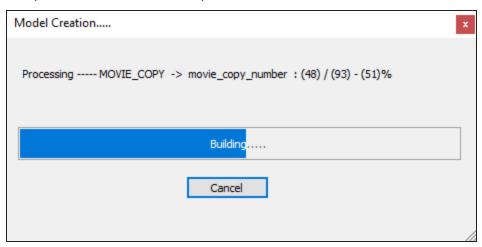
To convert an imported model to erwin DM format, follow these steps:

- 1. Start erwin DM and connect to your mart.
- 2. On the ribbon, click **Mart** > **Open**.

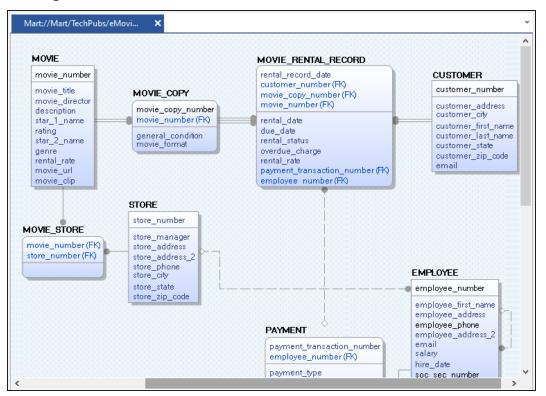
Open					_		×
Catalog:							
Mart	Name	Creator	Last Modifier	Modified On	Entity/	Attribu	Reli
TechPubs	eMovies _1TestOn	and the second s		19-07-2023 16:23:00	0	0	0
	eMovies _1_TestOn			19-07-2023 16:23:00	0	0	0
Model Name: eMovies _1 _TestOnLo	<pre></pre> cal_6July_1689763990480				Sho	w Templates	> only
Lock Type: Unlocked							_
					× .	<u>O</u> pen	
Model Description						Cancel	
					^		
					$\vee$		

## Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

3. Select the required model and click **Open**. The process to convert the imported model to the erwin DM format runs.



Once this process is complete, the model is converted to .erwin format and opened in the diagram editor.

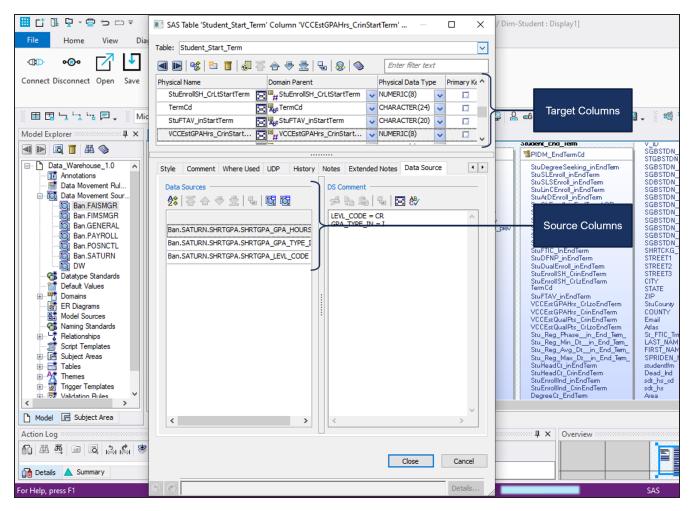


This model is saved to your mart catalog in the .erwin format with a time stamp. The following image shows the saved model in the Catalog Manager and in your mart library.

💽 Catalog Manager	Catalog	
Catalog		Ū
TechPubs     Call eMovies _1TestOnLocal_6July_1689763990480     Call eMovies _1TestOnLocal_6July_1689764024993     @- □ eMovies _1TestOnLocal_6July_1689764024993_17:0:32	<ul> <li>Mart</li> <li>TechPubs</li> <li>eMovies _1TestOnLocal_6July_1689763990480</li> <li>cb eMovies _1TestOnLocal_6July_1689764024993</li> <li>eMovies _1TestOnLocal_6July_1689764024993_1.</li> </ul>	

# Scenario: Import Source and Target Data into Mapping Manager

In case of dimensional model that has associated data sources, DM Connect for DI exports the source and target column data from the model into the Mapping Manager.



Schedule a job on your dimensional model. Once the job is completed successfully, DM Connect for DI creates a project. Under this project, it creates a mapping specification with the source and target column data from your model.

## Scenario: Import Source and Target Data into Mapping Manager

win			erwin	Mart A	dmir	nistrator					1	
E DM Cor	nnect for DI										Job run	on a
📑 Add Jo	b 🛛 👩 Delete Job	👩 Manage Job 🛛 👩 Ca	ncel Job   👩 Refresh Job	💿 View	Log	💼 Run Job					Dimensiona	al model,
🔲 Job N	ame	Last Scheduled Run	Next Scheduled Run	Job S	tate	Last Run Job	Status M	lodified By	Modified On		with associa	ited Data
Technic	calPublications	2020-06-08 20:13:16		Compl	eted	Success	m	macharla	2020-06-08 20:11:50		Sourc	es
Dimen:	sionalModel	2020-06-08 19:43:39	2020-06-08 09:15:00	Sched	uled	Success	m	imacharla	2020-06-08 19:42:59	<b>_</b> _		
				Mapping	Manag							
			kspace Mappings	-	•	Mapping Specific	ation Gr	aphical Desig	iner Test Specification	n Workflow		•
		4 N	Mappings		2	ji 😵 🔳 🍣 (C	ata_Ware_house	e_SAS _1]	Profiles: Defa	ult	🔽 🏟 🔯	2 < D
			<ul> <li>Projects</li> <li>Data_Ware_house_S/</li> <li>Transformations</li> </ul>	AS_1_pro	*	Source System Name	Source Environment Name	Source Name	Table Source Column Name	Source Colum Data Type	n Source Column Length	Business R
	2		Test Cases	use_SAS_	1	OPROD	ban- prod.valencia	cc.e SGBSTDN	SGBSTDN_ADMT_	C VARCHAR2(2)		A
	nd target colu to Mapping N		HappingTo	argets	2	OPROD	ban- prod.valencia	cc.e SGBSTDN	SGBSTDN_EXP_G	R. DATE		
					3	OPROD	ban- prod.valencia	cc.e SGBSTDN	SGBSTDN_SECD_F	VARCHAR2(1)		
					4	1	1					

## **Scenario: NSM Files**

If the models selected in a job have NSM files associated with them, DM connect for DI exports them to the Business Glossary Manager under the custom asset, erwin DM NSM.

Ensure that the erwin DM NSM asset is enabled under **erwin DI** > **Business Glossary Manager Settings**.

DATA INTELLIGENCE SUITE	usiness Glossary Manager Settings		0	٦	
ASSET TYPES ASSOCIATION	S & RELATIONSHIPS OTHER C	CONFIGURATIONS			
BUSINESS ASSETS	< Asset Details	Catalog DM NSM Asset			
BT Business Terms	Name*	erwin DM NSM			
BP Business Policies	Title*	DM NSM Asset			
BR Business Rules	Description	To Share and reuse model objects within an organization, erwin DM uses Naming Standards for logical and physical objects in the model so that everyone in your organization uses the names consistently and correctly. The entries in this list are used to expand the abbreviated (cryptic) table/column names to Expanded Logical	•		
ED erwin DM NSM		Name in Metadata Manager.			
SG Stewardship Goals			-		
	Color	#F6C65B			
	Documents Required				
	Enable Asset	Select Enable Asset			
	Enable Definition				
	Enable Sensitivity Field	ts 🗌			
	Display Order	4.0			
Add New	Image				

Under the erwin DM NSM asset, each unique NSM file is added as a catalog.

#### **Scenario: NSM Files**

	erwin Mart Administrator	1 mmacharla 👻   LOCOUT   O Help
DM Connect for DI		
	🕝 Manage Job   🍘 Cancel Job   💦 Refresh Job   👁 View Log   📋 Run Job	
Job Name TechPubsDept	Last Scheduled Run Next Scheduled Run Job State Last Run Job State 2020-05-15 18:30:00 Scheduled	us Modified By Modified On mmacharla 2020-06-15 05:52:23
		1
BUSINESS ASSETS	< CATALOG VIEW	Job with 2 models; 2 NSM
BT Business Terms	Workspace < DM NSM ASSET Summary	files, eMovies.nsm and TruistABBV.nsm
BP Business Policies	Compact View Grid View	Items Per Page 50 - Page 1 PREVIOUS NEXT
BR Business Rules	TruistABBV (245)     Search	itellis rei rage 50 + rage i Previous INEXI
ED erwin DM NSM	eMovies CUST	No Status
SG Stewardship Goals	2 No Description availab	le ·
	<ul> <li>2 catalogs based on the NSM files attached to the models are created.</li> <li>Glossary words from each files are added to the respective catalogs.</li> </ul>	le No Status 0

## **Case I: One NSM File, Multiple Models**

In a job, if a single NSM file is associated with multiple models, a single catalog is created for both models. The contents of the corresponding catalog under the erwin DM NSM asset type in Business Glossary Manager are overwritten.

## Case II: Multiple NSM Files, Multiple Models

In a job, if multiple NSM files are associated with multiple models, multiple catalogs, corresponding to the NSM files are created under the erwin DM NSM asset type in Business Glossary Manager.

# **Scenario: View Logs**

After a job runs, you can view its log to understand more about the job status. In case of failures, you can then troubleshoot using the logs.

To view a job's log, select a job and click **View Log**.

Connect for DI				<b>İ</b>	Þ 0	<u></u>	1 =
JobName	Last Schedule Run	Next Schedule Run	Job State	Last Run Job Status		Modified By	
REDB_SQS2019_DISV11	2022-01-25 18:50:51	2022-01-27 18:50:00	Scheduled	Success	Select	a job and	click
View Logs					here	to view its	log
[25/01/22 06:50:42:042 IST [25/01/22 06:50:42:042 IST [25/01/22 06:50:42:042 IST	12_REDB_SQS2019_DISV11	: DisplayJobBean:getJobByld() : Start Create/Get SystemName : E : End(Success) Create/Get System				/	
[25/01/22 06:50:42:042 IST	12_REDB_SQS2019_DISV11 12_REDB_SQS2019_DISV11 12_REDB_SQS2019_DISV11		el export				
ownerName ::Mart/SQS201 [25/01/22 06:50:42:042 IST	9_REDB_DISV11	: 65558=> Evaluated Enviroment N : 65558=> Start Report File Genera : Entering Query ReportAPI		REDB_DISV11, modelName ::	SQS2019_RE	DB_DISV11,	

# Reference: Data Sharing between erwin DM and erwin DI

For data to be shared between erwin Data Modeler (DM) and erwin Data Intelligence (DI), the attributes and properties of objects in both the applications must correspond to each other. Refer to the following tables to understand how erwin DM Connect for DI maps data between applications.

LIBRARY-SYSTEM				
erwin Data Modeler	erwin DI			
Library/Catalog Name	System Name			
Description	Business Purpose			

#### **MODEL-ENVIRONMENT**

erwin Data Modeler	erwin DI
Model Name	System Environment Name
Model Type	System Environment Type
Version	Version
Description	Intended Use Description

## TABLE-TABLE

erwin Data Modeler	erwin DI
Model Name	Environment Name
Library Name	System Name
Entity Name	Logical Table Name
Comment	Table Comments
Schema_Name	Schema

#### Reference: Data Sharing between erwin DM and erwin DI

COLUMN-COLUMN				
erwin Data Modeler	erwin DI			
Domain Parent	Data Domain			
Physical Data Type	Data Type, Precision, Length, Scale			
Null Option	Nullable Flag			
Foreign Key	Foreign Key Flag			
Primary Key	Primary Key Flag			
Child Column Name	Foreign Key Column Name			
Child Table Name	Foreign Key Table Name			

#### **UDP-EXTENDED PROPERTIES**

erwin Data Modeler	erwin DI
UDP Name	Key Name
Value	Value
Description	Description

NSM-erwin DM NSM				
erwin Data Modeler	erwin DI			
NSM File Name	Catalog Name			
Abbreviation	Asset Name			
Glossary Word	Definition			

NSM files have multiple parameters. However, DM Connect for DI is configured to push only the Glossary Word and Abbreviation to erwin DI.

DATA MOVEMENT SOURCE-MAPPING

erwin Data Modeler	erwin DI
Data Source DBMS Type	Database Type
DS Transformations	Business Rule
Library	Target System
Model	Target Environment
Table	Target Table
Column	Target Column
Datatype and Length	Target Column Datatype and length
Source Library (Or Data Source Name)	Source System
Source Model (Or Data Source Server)	Source Environment
Source Table (Or Data Move- ment Table)	Source Table
Source Column (Or Data Move- ment Column)	Source Column
Source Column Datatype ( Or Data Movement Column Data- type)	Source Column Datatype and length
	Check whether datatype and length are added to the corresponding fields. If not, you need to cor- rect it manually.

## Reference: Data Sharing between erwin DM and erwin DI

# Limitations

The following list summarizes the limitations of erwin DM Connect for DI.

- If table's or column's Definition property is updated in a model, the update is not exported when the job is run again. To export the updated Definition, set the job's Export Options to Delete & Reload.
- When you apply an NSM file to a model, it is applied at the model-level. Therefore, it is applied to all versions of the model.
- When you use the validation rules, enure that the names of valid values do not exceed 200 characters, or the validation rules are not exported to DI.